Guidelines for Professional Development

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During the last few months many of you have probably heard about our effort to establish professional development guide lines for financial management personnel assigned to designated positions. In this article, I want to provide you more details. Specifically, I want to tell you why we believe the initiative is important, describe each element of the guidelines, explain to whom the guidelines apply, outline the actions we have taken to date, and discuss the next steps.

Why Professional Qualifications are Important. Before explaining the importance of this initiative, let me make it clear we are not establishing professional development guidelines because the current workforce is not qualified. Nothing could be further from the truth. Financial managers are providing world-class support at every level of the Air Force. Whether providing service at our FSOs, formulating, defending, and executing budgets, or providing cost and economic analyses to Air Force leadership, your support of the warfighter is both vital and superb.

While providing this outstanding financial support, the overall financial management workforce will have declined by 40% between FY86 and FY02. Additionally, a large segment of our civilian workforce is reaching retirement eligibility, and as a group our military members are younger and less experienced due to drawdowns and attrition. Further, a series of legislative mandates, enacted over the last eight years, have dramatically changed financial management accounting and reporting within the Federal government. Now, for example, we must produce auditable financial statements.

Make-Up of the Professional Qualification Guidelines. You will note the word guideline is used with professional development throughout this article. Use of the term guideline is important because this initiative does not set requirements for jobs or promotions. Rather, the guidelines establish a *roadmap* for personnel to maintain proficiency and plan their careers. The guidelines are also intended to help supervisors prepare personnel for positions of increased responsibility and assist them when selecting individuals to fill designated positions. Even though we will track only designated positions to monitor the program's effectiveness, we encourage everyone to attain the objectives of the guidelines.

The dynamics of a smaller, changing workforce, technological changes, and new financial requirements mean the financial management career field will require a cadre of well-educated professionals that have breadth and depth of experience, understand the Air Force mission, and are constantly maintaining their proficiency.

The guidelines address general education, experience, technical and professional military education, and relevant certification. We also hope to include, in the not too distant future, a test-based certification specifically developed for DoD financial personnel. Finally, the guidelines set an objective of attaining annual continuing professional education.

How the Guidelines Apply to You. Before addressing the specific elements of the guidelines, it is important to explain to whom the guidelines apply and how differing levels of experience are addressed. The guidelines are applicable to both military and civilians assigned to designated positions, and the established objectives for each area vary based on experience. Specifically, positions are categorized into three levels depending on the experience level required for the position. For example, a Financial Services Officer at an operational wing may have only a few months experience and therefore could not be expected to have attained the same level of education and experience as a Budget Officer at a major command. Therefore, we have divided the designated positions into three levels using the expected experience or grade level required for the positions in each level. The guidelines are then applied to each designated position, and become more stringent at each level. The specific elements of the guidelines include objectives for:

- General Education
- Experience
- Technical and Professional Military Education
- Certification

This chart presents the guideline objectives for each level.

Professional Development Guidelines

	Level 1	Level 2	Level 3
Typical Grade	GS-9/12 MSgt-CMSgt 2nd Lt-Capt	GS-13/14 Maj-Lt Col	GS-15/SES Col/General
General Education	Undergraduate Degree with 12 semester hours of financial related courses	Graduate work with financial management related courses	Graduate Degree with 6 semester hours of financial management courses
Experience	Working to attain experience in two financial management disciplines.	Six years financial management experience with experience in 2 FM disciplines	Ten years financial management experience with experience in 2 FM disciplines
Technical and Professional Military Education	FMSOC SOS	PMCS ISS	SSS
Certification		Relevant Certification (Highly Desired)	Relevant Certification (Highly Desired)

Continuing Professional Education: Overlaying the education and experience guidelines, is an objective of obtaining at least 80 hours of training every two years starting in CY2000. Continuing professional education can be obtained in many ways. The above general education, technical and professional military education, and certification will qualify as CPE during the year accomplished. So, too, will any financial management (e.g., Acquisition, CPA, etc.) related courses, conferences, seminars, professional development instruction (PDI), presentations, and article/book publication. Financial management personnel assigned to acquisition positions can substitute training required for acquisition certification in meeting the financial management requirements. However, we encourage personnel in the acquisition program to orient their acquisition training to financial management issues.

While these guidelines will not be used as requirements, they can be used in considering candidates for jobs and promotions. Most of the guidelines will go into effect on 1 January 2000. We recognize that some personnel in designated positions will not have met all the guidelines and will require time to do so. For the next several years, personnel making reasonable efforts to meet the guidelines should be given the appropriate recognition.

Actions to Date. During the last year, we defined the concept and established the general guidelines. We then obtained concept approval from the Air Force senior financial leadership. After that approval, we developed more specific criteria for program, then coordinated the guidelines with the major command (MAJCOM)/field operating agencies (FOA)/direct reporting units (DRU)/ FMs. We presented the more detailed version at the November 1998 executive session.

After that session, Secretary Hale, in consultation with the Deputy Assistant Secretaries and FMs from all the MAJCOM/FOAs/DRUs, approved the professional qualification guidelines and set in motion a series of actions over the next 18 months to refine the guidelines and begin implementation. First, each MAJCOM/FOA/DRU identified points of contact to work the details of the program. This group held their first meeting in early December. Additionally, each MAJCOM/FOA/DRU began the process of designating positions for inclusion in the guidelines. Col Maryetta Pesola, the FM OPR, is now developing an individual development plan that will provide the previously mentioned roadmap for individuals and supervisors. In the meantime, we developed two courses, *Antideficiency Act Investigator* training and *Resource Advisor* training, for the SAF/FM Home Page and CD-ROM. Further plans include developing fiscal law for the Home Page and CD-ROM and working with the Systems Acquisition School to develop *virtual classroom* courses.

Recently Secretary Hale and I sent each base/installation FM a copy of the guidelines. With this step we have officially put the guidelines in place. If you haven't seen the specifics of the guidelines, please ask your base/installation FM for a copy or look at them on the SAF/FM Home Page.

Next Steps Beginning Early in CY99. Secretary Hale and I are planning a *roadshow* to explain the initiative to as many FM leaders as possible. We plan to present the program at comptroller conferences, FM calls, and VTC sessions where *face-to-face* sessions are not practical. In June, we will release the Individual Development Plans to the field for implementation and establish an abbreviated Continuing Professional Education objective of 10 hours for CY99.

While many of our senior leaders have had input, we know the program will benefit from your comments. Therefore, in late CY2000, we will ask MAJCOM/FOA/DRU FMs to gather comments through their base FMs, assess the program and provide us feedback. We will make any necessary adjustments based on the feedback.

Conclusion. Hopefully, this article provides you a better picture of our objectives for professional development. The guidelines provide a road map to assist all financial personnel (designated and undesignated positions) in setting goals and documenting career and training requirements for future career objectives. Further, this road map should help supervisors assist personnel plan and attain career objectives and arm us with the tools necessary to fight the financial battles of the future. In the final analysis, our goal is clear—to continue providing the Air Force with world-class financial management. Professional development is critical to that goal.